"We Help Put America Through School"

Data Strategy 2.0
Data Quality Steering Committee Kickoff

February 27, 2004

Updated: March 1, 2004

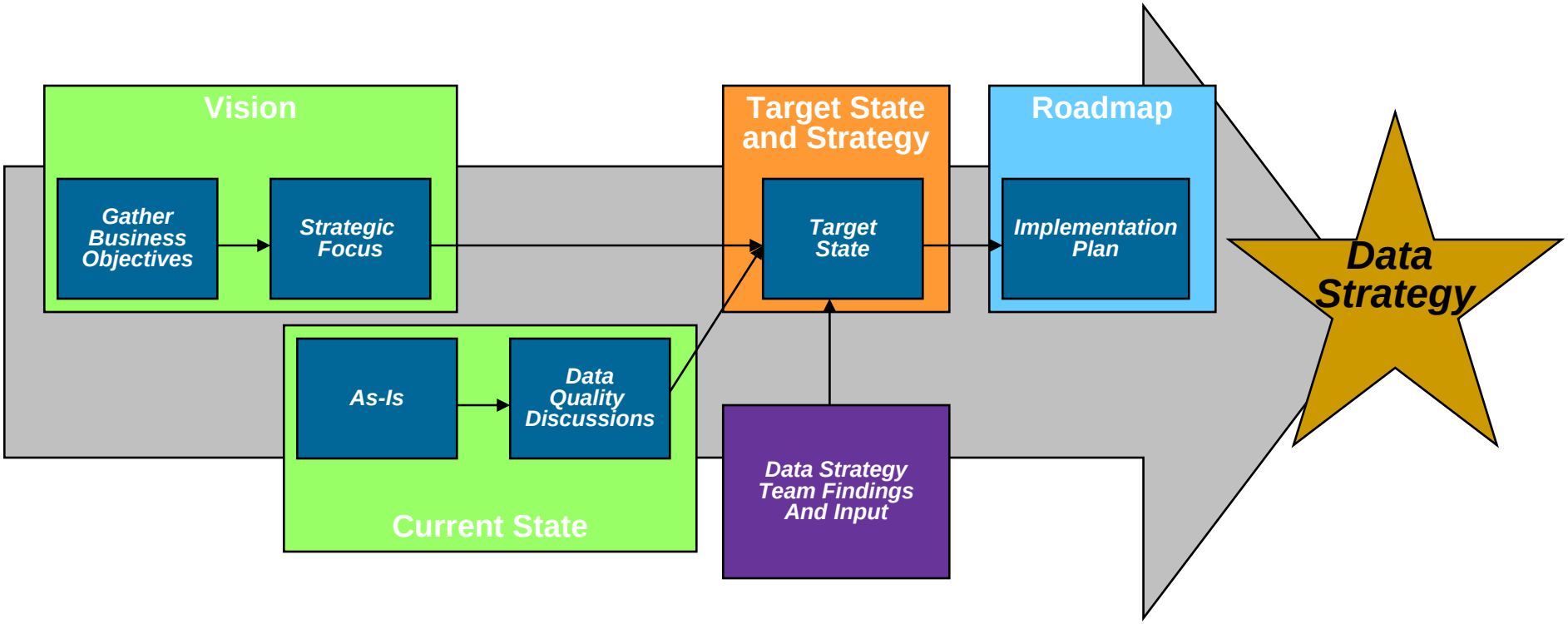
Agenda

- Data Strategy Overview
- Data Quality Implementation Methodology
- Participants and Schedule
- Next Steps
- Questions

Data Strategy High Level Objectives

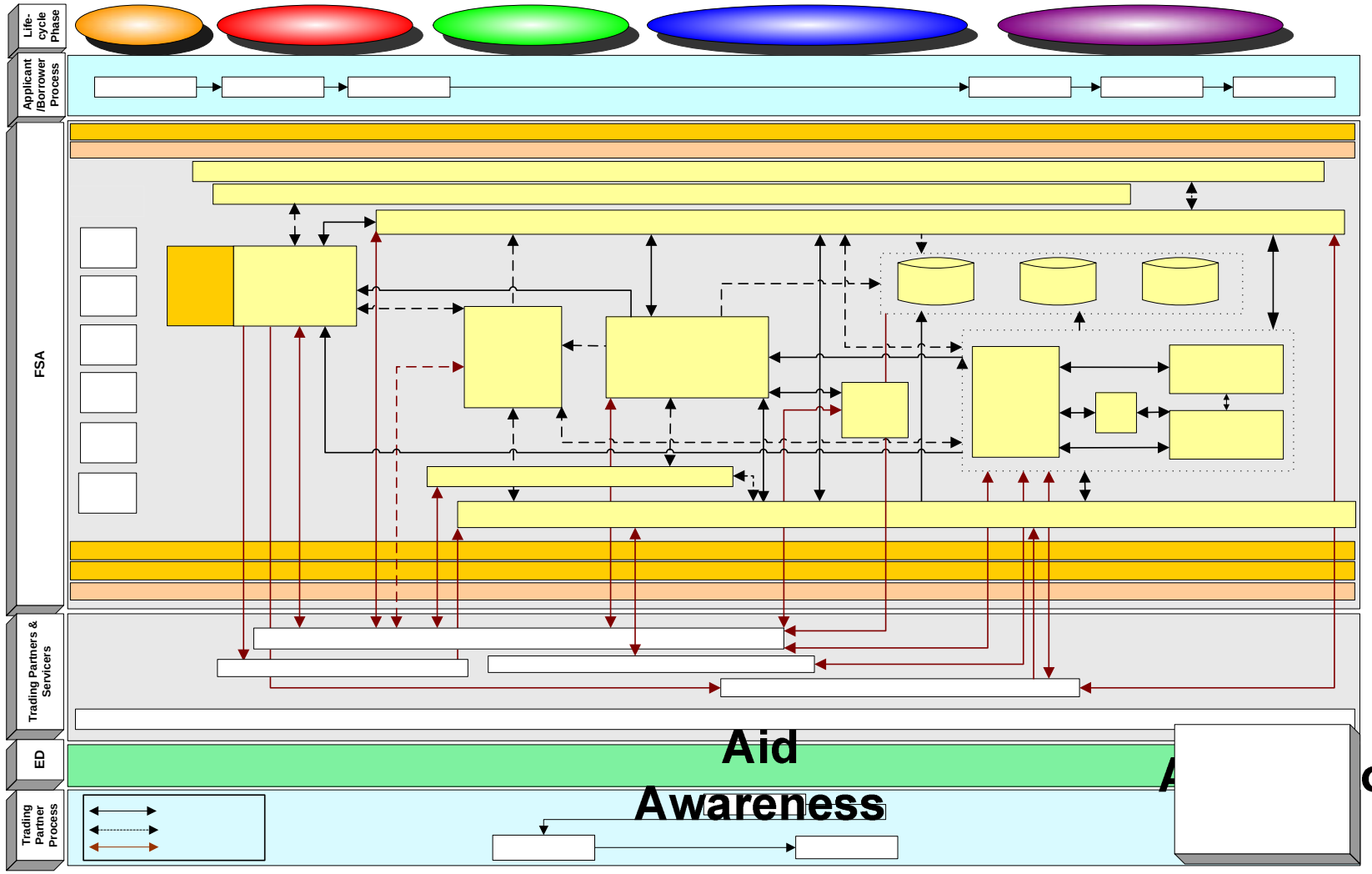
- Reduce redundant data storage
- Improve customer service
- Increase accuracy of analytics
- Increase efficiency in data handling
- Reduce costs
- Remove FSA from the GAO high-risk list
- Maintain a clean audit

Data Strategy Overview



- Gather **Desired Outcomes** and **Current State**
- **Create** the **Target Vision** for Enterprise Data Usage
- **Facilitate** Paradigm Shift from **Current to Target State**

Data Strategy – As-Is Life Cycle



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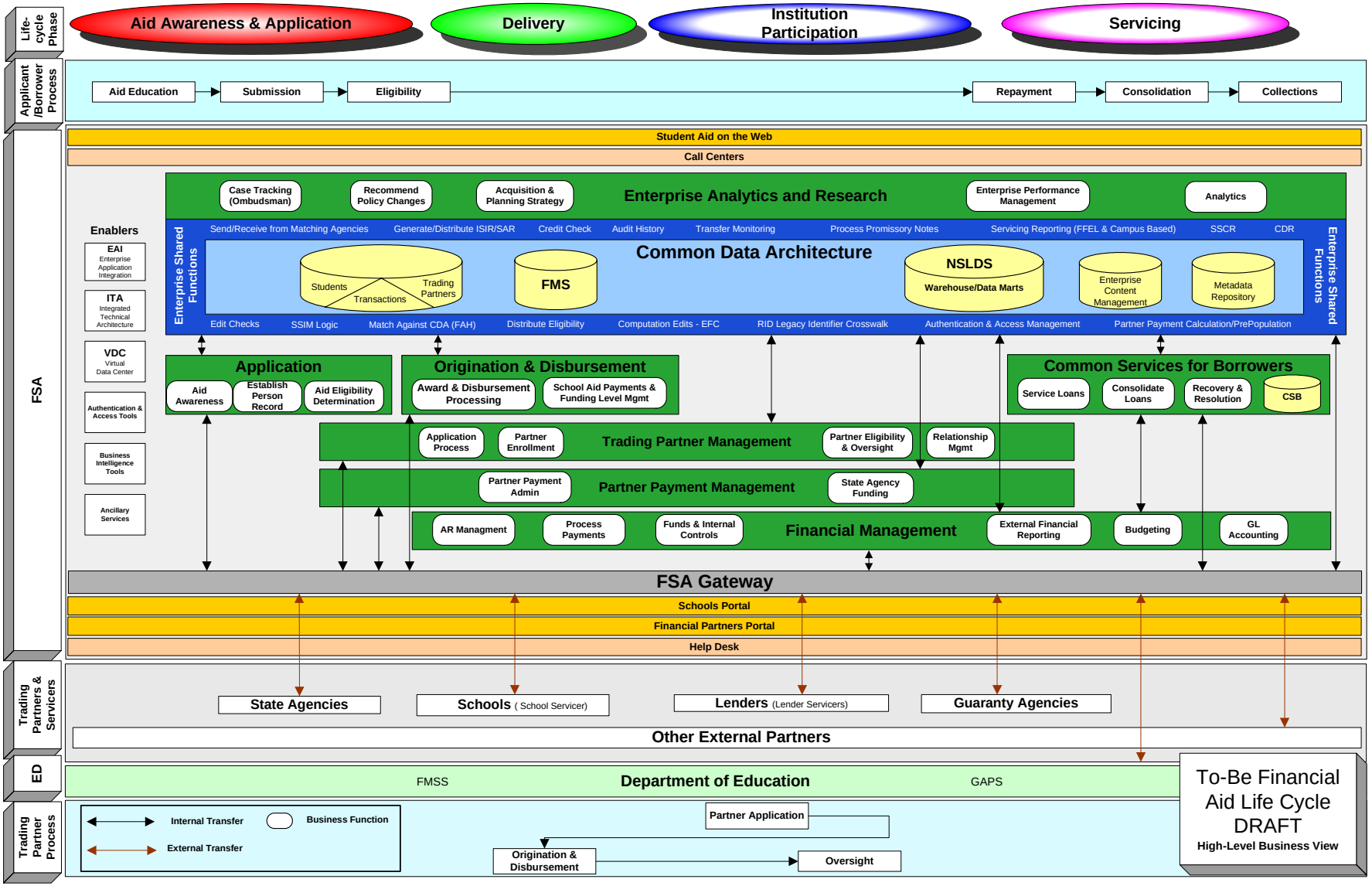
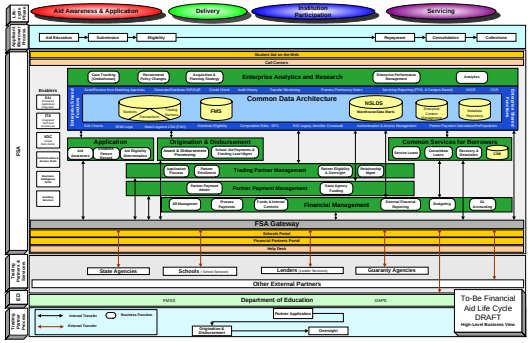
Data Strategy To-Be Life Cycle

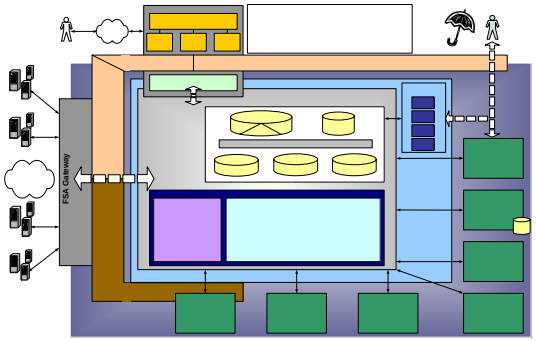


Data Strategy Background

Where We Are

- Gathered Business Objectives
- Drafted Target Data Flows
- Created a Vision of “What it should look like”





What We Need To Do

- Explore options for new questions raised during Target Vision Discussions and Retreats
- Implement XML Registry / Repository of Core Components to the Internet
- Enact the Data Quality Assurance Methodology for the Enterprise

Open Data Quality Questions

- What do we need to do to get started?
  - Define members of the Steering Committee
  - Define roles, processes, evaluation criteria, etc.
  - Develop Working Groups
- How do we track improvements and impacts?
  - Consolidate issues
  - Develop meaningful reports
- How does this fit into Enterprise initiatives like QA, SLC and ECM?
  - Determined through ongoing discussion
  - Input from the BTIG

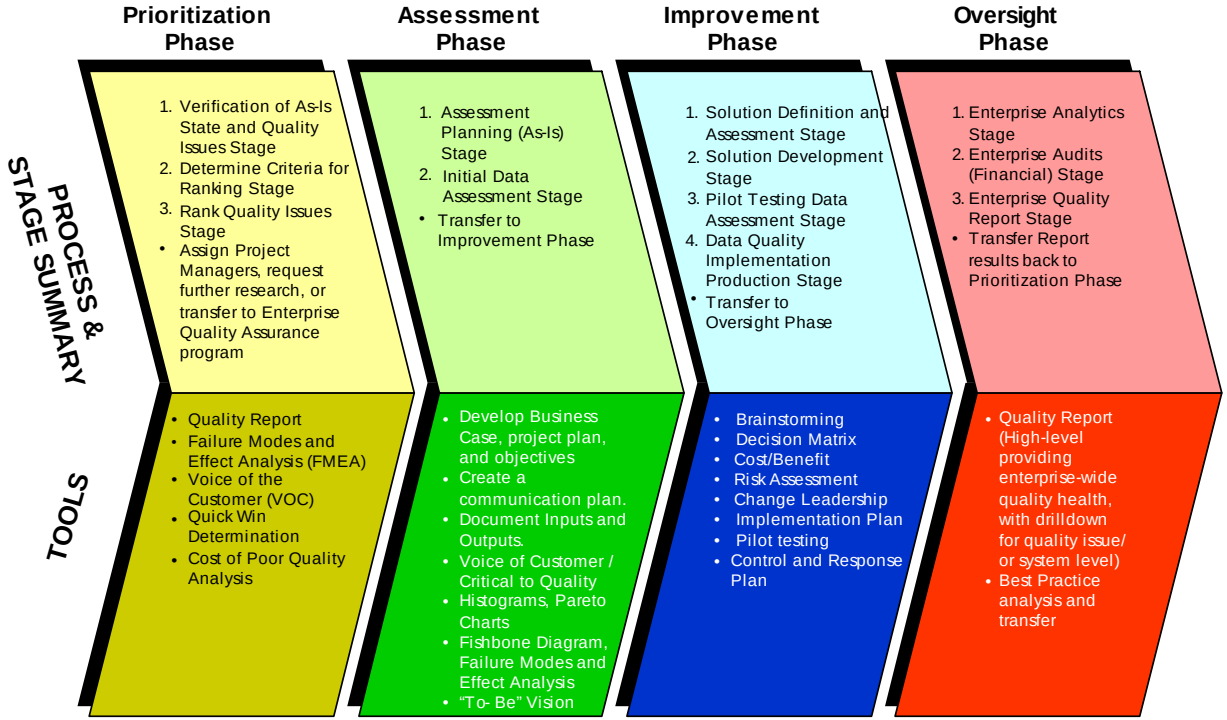
Data Strategy High Level Objectives – Data Quality

- Intelligently combine technology and process to increase Business Decision Efficiency by providing the right data with the right security levels to the right people at the right time
- Provide clear stewardship of the data throughout the FSA Lifecycle
- Develop policy standards and clearly defined common identifiers for sharing data across the enterprise and compliance with federal regulations
- Provide an integrated, cross-life cycle, web-delivered customer view that is system independent
- Establish and follow common data definitions that facilitate the exchange of data internally and externally
- Right-Time Data Exchange between systems

Purpose of Data Quality Management Support

- **What <u>we</u> need to do:**
  - Develop summary report describing the formation of the Data Quality Steering Committee and the subsequent management and strategic data cleanup:
    - Support adoption of the Data Quality Assurance Strategy
    - Support creation of Steering Committee
    - Support management and execution of strategic data cleanup activities
    - Coordinate and integrate with ongoing Enterprise Configuration Management and Solution Life Cycle processes

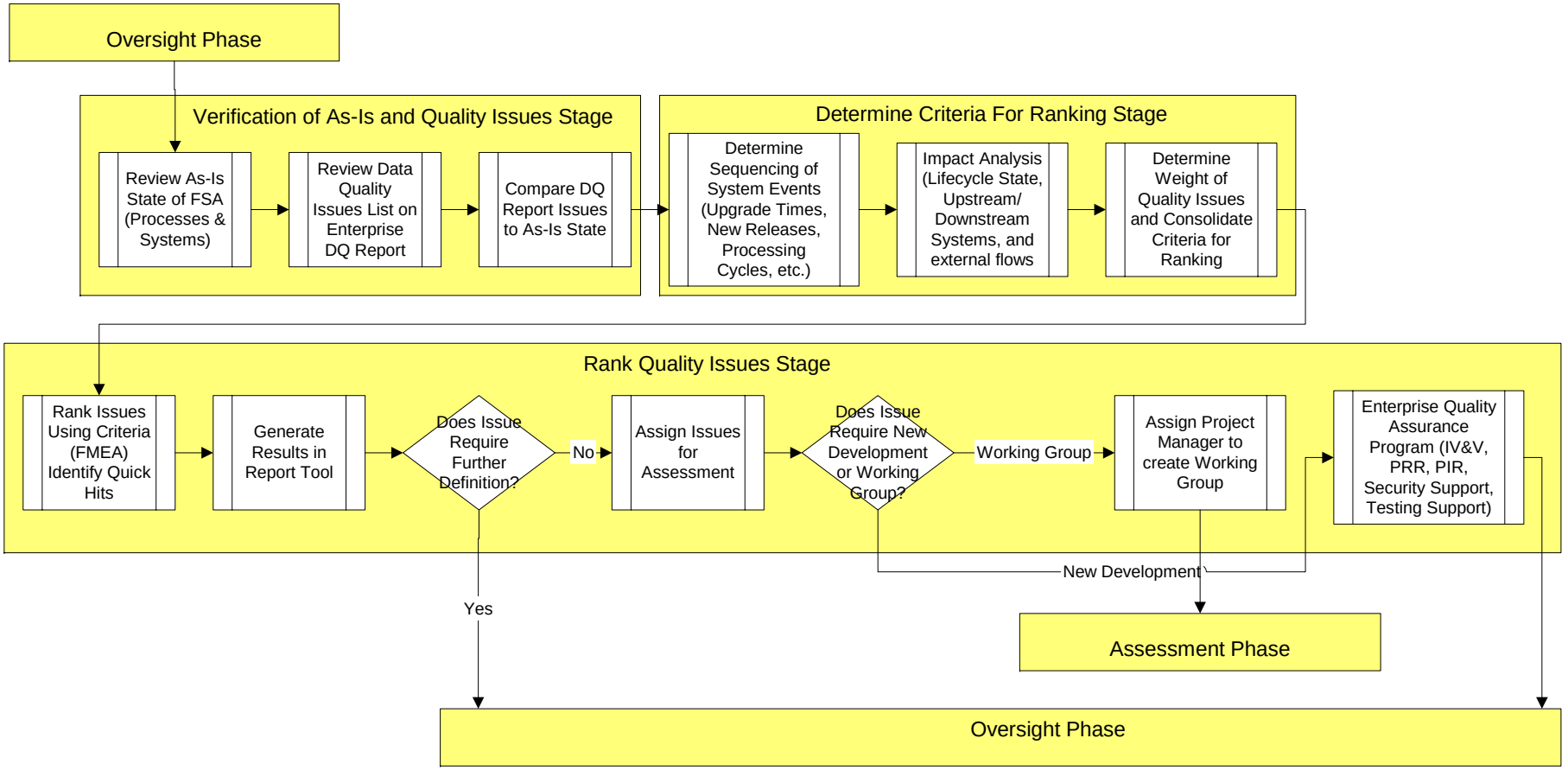
Data Quality Assurance Methodology



- **Four-Phased Approach -** Establishes repeatable processes for identifying, correcting and maintaining data within the Enterprise

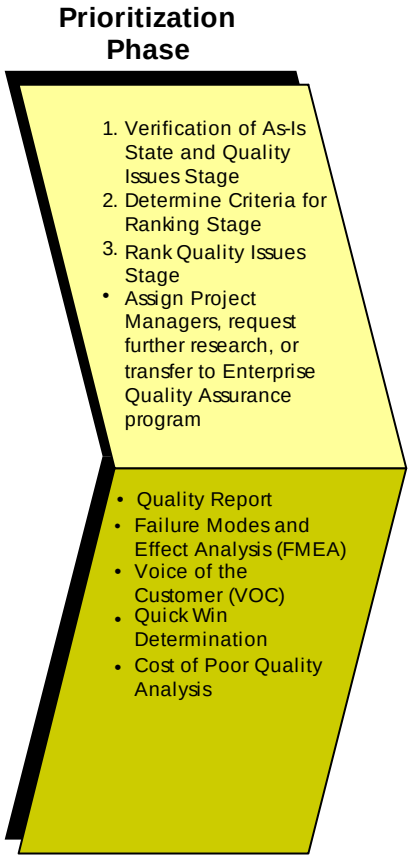
Data Quality Assurance Methodology - Details

Prioritization Phase



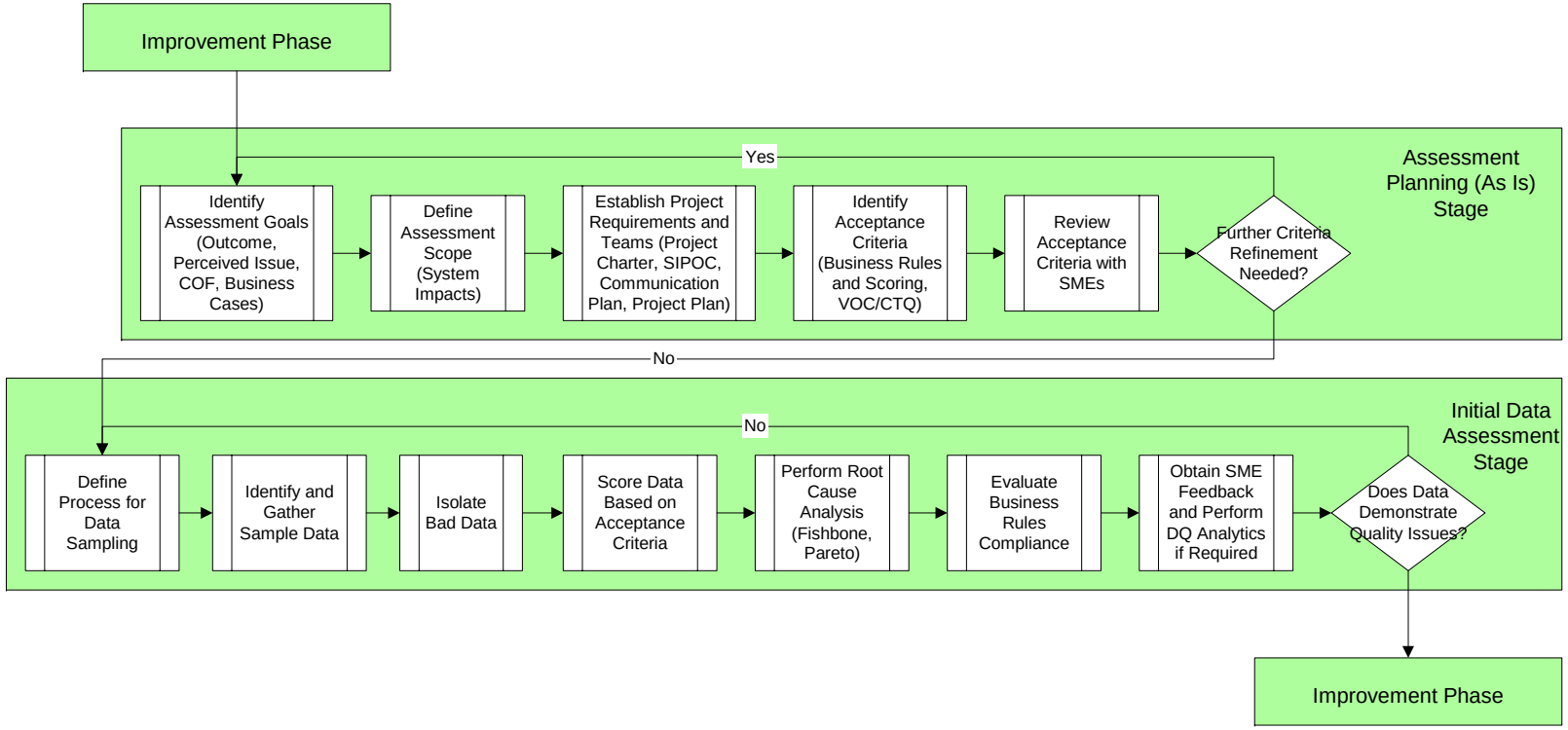
Prioritization Phase – Key Points

- Steering Committee performs prioritization
- Active Issues are identified by evaluating the current system state, Mad Dog issues, and new issues
- Ranking criteria is defined to prioritize issues
- Issues are ranked and assigned for further analysis/attention



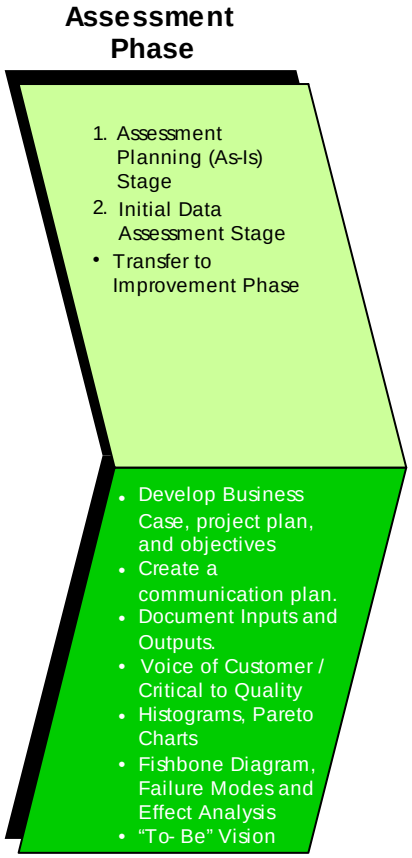
Data Quality Assurance Methodology - Details

Assessment Phase



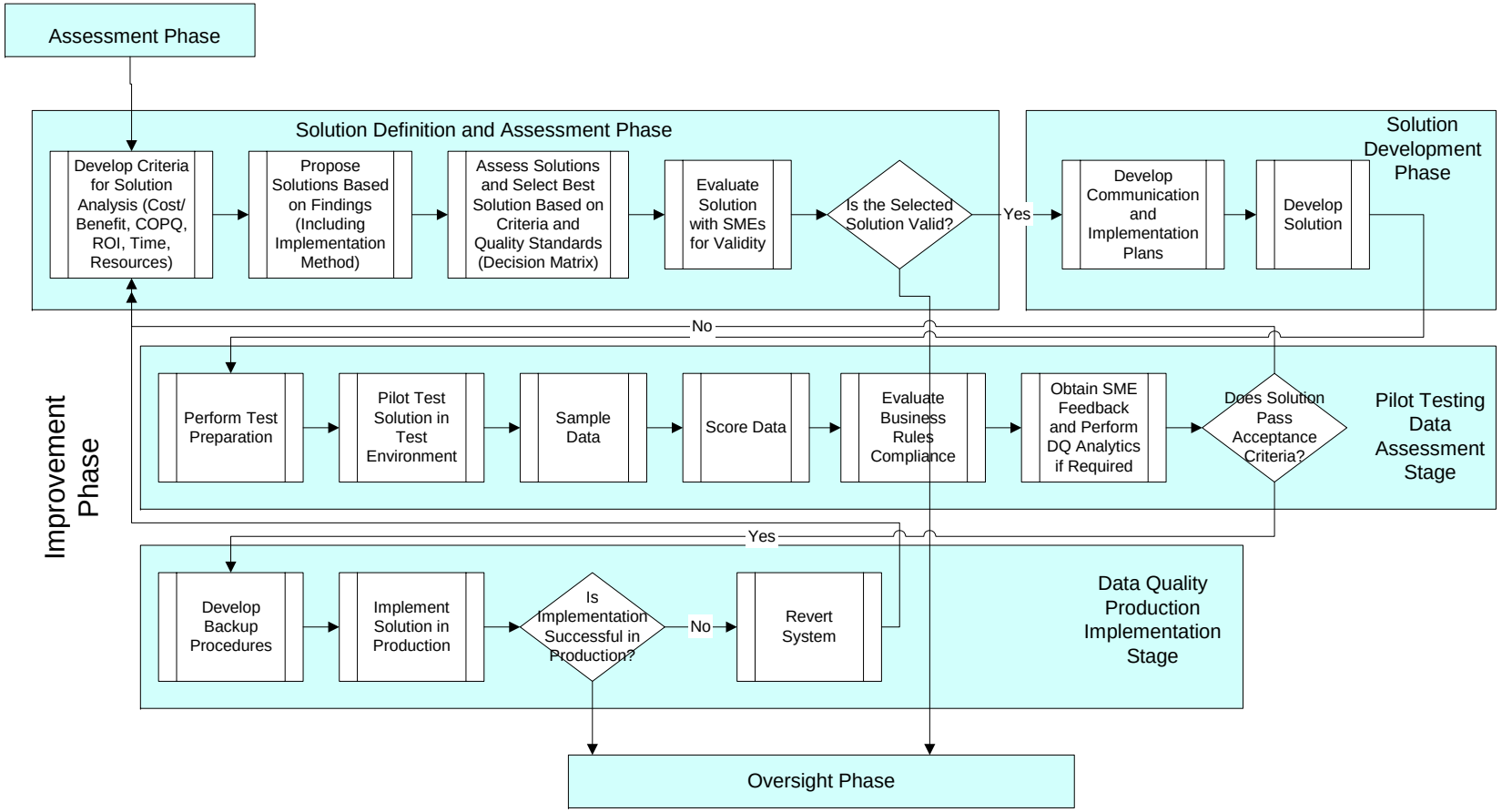
Assessment Phase – Key Points

- Working Groups perform assessment
- Goals, scope and acceptance criteria are defined for the data assessment
- Issues are evaluated as to their source
- Data is evaluated against the acceptance criteria and business rule compliance
- Subject Matter Experts provide feedback



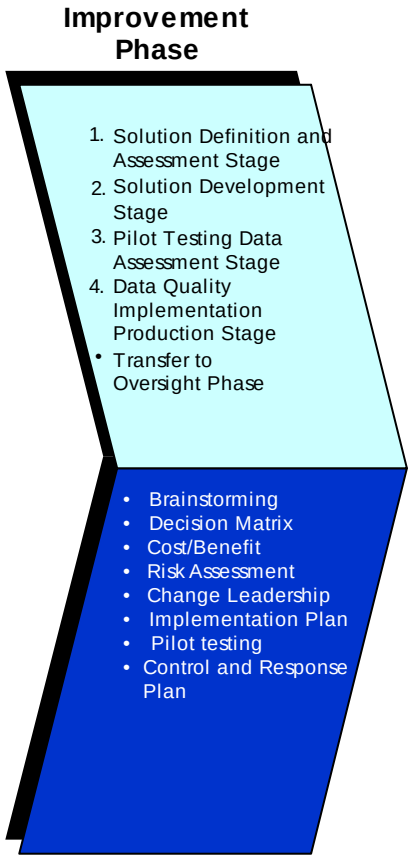
Data Quality Assurance Methodology - Details

Improvement Phase



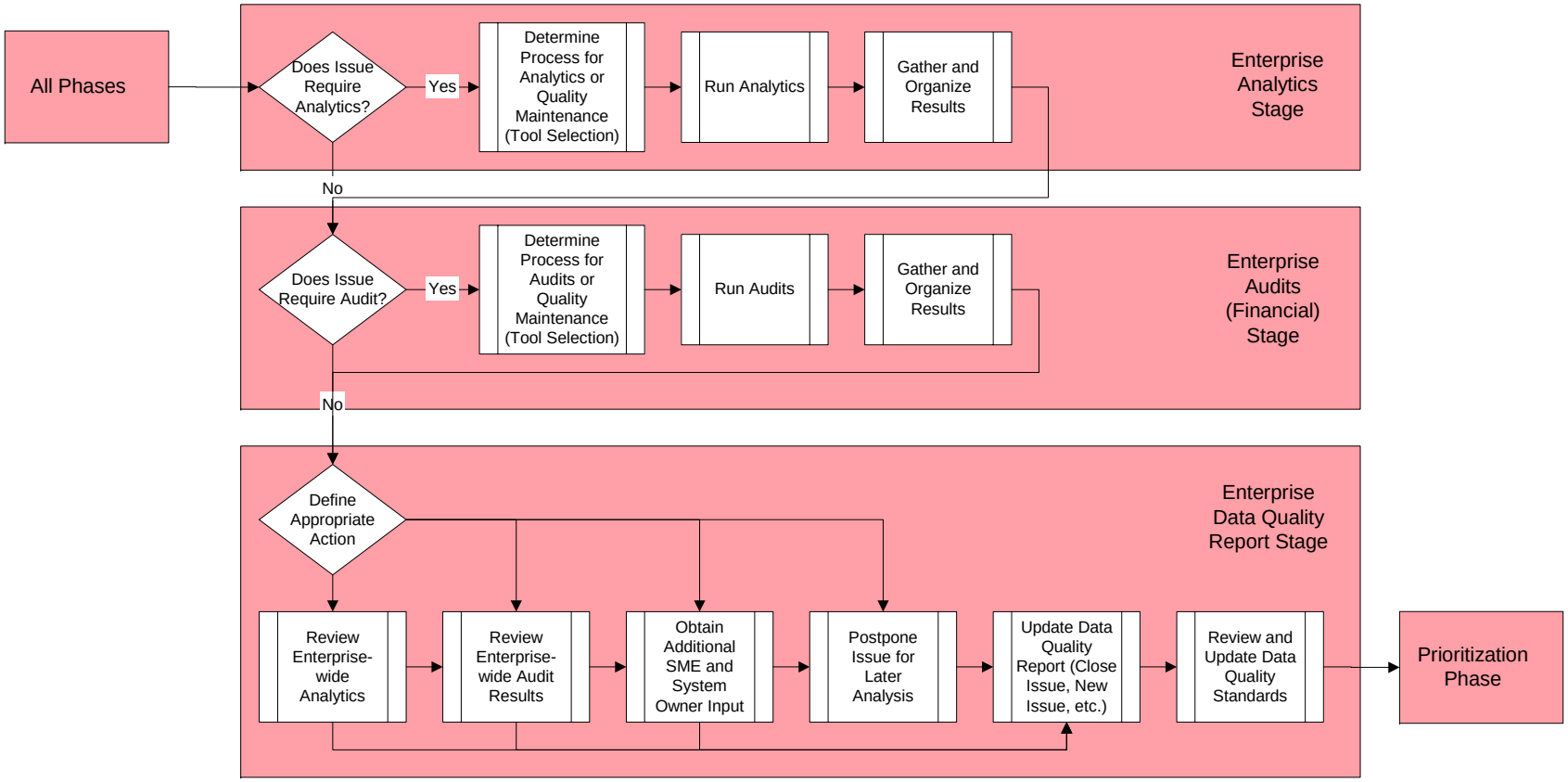
Improvement Phase – Key Points

- Working groups perform improvement
- Solutions are evolved and evaluated against criteria
- The recommended solution is selected and developed
- The solution is pilot tested and data is re-evaluated
- The solution is implemented in production



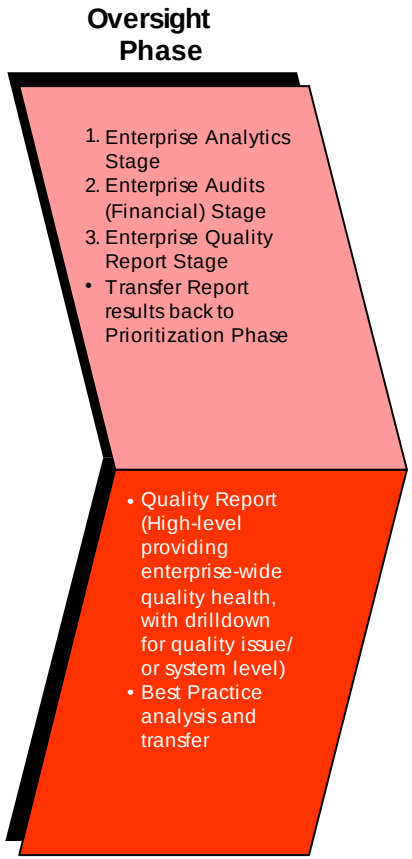
Data Quality Assurance Methodology - Details

Oversight Phase



Oversight Phase – Key Points

- Steering Committee performs oversight
- Issues are further refined through analytics
- Solutions are evaluated through audits
- Issues are placed in the Parking Lot for later evaluation
- Enterprise Data Quality Report and Data Quality Standards are updated



Mad Dog Recap

- Issue Groups
  - Common Identification Methods for Students, Trading Partners and Aid
  - Data Reconciliation and Analytics
  - Education and Communication
- Top Ten and Quick Hits
  - No prioritization beyond this point
  - ~ 50 issues in addition to TT and QH

Integration Partner Tasks

- Deliverables
  - 152.1.10a Data Quality Management Support Report I - Due 5/31/04
  - 152.1.10b Data Quality Management Support Report II - Due 9/30/04
- Implement Data Quality Methodology
- Create and Maintain the Data Quality Issue Management Tool
  - Provides means to enter, track and resolve issues
  - Provides flexible reporting capabilities
  - Integrates business templates
- Facilitate Issue Resolution
- Communicate Methodology and Results Achieved
- Integrate With the Following Efforts:
  - XML Framework
  - Technical Strategies
  - Data Framework
  - IPM

Data Quality Steering Committee Members

- Core Members
  - Rosemary Beavers – FSA
  - Nate Brown – Integration Partner
  - Matt Fontana – FSA
  - Paul Hill – FSA
  - Jane Holman – FSA
  - Julie Meyers – Integration Partner
  - Jason Patton – Integration Partner
  - Dan Ragan – Integration Partner
  - Jeanne Saunders – FSA
  - Dwight Vigna – FSA
  - Keith Wilson – FSA
- Additional FSA Subject Matter Experts as necessary

Proposed Data Quality Management Support Schedule and Approach Through 5/31

Week of	Meeting	Objectives
2/23	Data Quality Steering Committee (SC) Kickoff	•Have initial meeting with Steering Committee to present overview of data quality assurance methodology
3/1	SC Working Session 1	•Define roles and process •Review Quality Report prototype
3/8	SC Working Session 2	•Complete definition of roles and process •Discuss integration with other Enterprise initiatives
3/15	SC Working Session 3	•Determine quality measures/tolerances •Determine issue evaluation criteria •Discuss System Owner quality initiatives to-date
3/22	SC Working Session 4	•Review Business Templates •Identify active Mad Dog issues •Identify new issues
3/29	SC Working Session 5	•Review and prioritize new and Mad Dog issues •Assign issues to Working Groups
4/5	SC Working Session 6	•Continue review and prioritization of new and Mad Dog issues •Follow up on assigned issues
4/12 -5/31	SC Working Sessions	•Discuss new issues •Receive updates on assigned issues
4/12 – 5/31	Working Group Status Sessions	•Follow up on assigned issues
5/17	Deliverable Review Meeting	•Review deliverable prior to submission •Present deliverable findings to SC/BIG
5/31	**Submit Deliverable 152.1.10a**	

Next Steps

- Identify Additional Members of the Steering Committee
- Review Roles and Responsibilities
- Review Proposed Data Quality Report(s)
- Review and Update Mad Dog Issues
- Identify New Issues
- Implement Data Quality Assurance Processes
  - Issue evaluation
  - Working Group assignment
  - Data assessment
  - Communicate w/ Enterprise Business Owners
- Resolve Issues!

Questions?